



Executive Office of Health and Human Services
Virtual Gateway
**Deployment Checklist of EIM/ESM
Providers new to the Virtual Gateway**



This checklist of “things to do” will help prepare your organization to use the Enterprise Invoice Management/Enterprise Service Management (EIM/ESM) business service within the Virtual Gateway. Before “going live” on EIM/ESM, each organization will need to:

☐ **1. Read and Sign the Virtual Gateway Services Agreement (FORM A).**

The *EOHHS Virtual Gateway Services Agreement* sets forth the terms and conditions to which your organization must agree in order to access the Virtual Gateway. The *EOHHS Virtual Gateway Services Agreement* must be signed by an individual at your organization who has the legal authority to sign on behalf of your organization, as evidenced by your organization’s charter or bylaws.

☐ **2. Read and Sign the EOHHS Virtual Gateway Designation of Access Administrator Form (FORM B).**

Each organization must designate an individual to be their Virtual Gateway Access Administrator. This ‘Access Administrator’ is the liaison between EOHHS and the organization and its users for issues relating to Virtual Gateway account information and access. Specifically, the Virtual Gateway Access Administrator is responsible for approving, modifying, or removing user access privileges to any of the Virtual Gateway’s business services for employees in your organization. The *EOHHS Virtual Gateway Designation of Access Administrator Form* must be signed by an individual at your organization who has the legal authority to sign on behalf of your organization, as evidenced by your organization’s charter or bylaws. For additional information about the Access Administrator role please see the VG Access Administrator Frequently Asked Questions [here](#).

☐ **3. Read and Sign the Enterprise Invoice Management/Enterprise Service Management Rider (FORM C).**

Certain business services require organizations to agree to additional terms and conditions of use, which are included in riders to the standard Virtual Gateway Services Agreement. These riders must also be signed by your organization, and will become incorporated into the Virtual Gateway Services Agreement.

☐ **4. Complete the Organization Management Template (FORM D).**

The EIM/ESM Organization Management Template collects required information about your organization, sub-organizations and affiliates (if applicable) to verify provider organization definition and relationships. This information will also provide the framework for developing data access rights to EIM/ESM.

Some providers may have already completed a draft Organization Management Template. If so, you may want to reference that document when completing this final template.

Conference calls will be held to assist providers going “live” in EIM/ESM in October 2006 in completing the Organization Management Template. Please refer to the table below for dates and times. The call in number is 866-762-1589. At the prompt, each caller should enter the following participant access code: 2515839.

Agency	Program(s)	Date	Time
DMR	All	7/12/06	1:00PM- 3:00PM
DPH	SBHC, BSAS	7/18/06	1:30PM- 3:30PM
DMH	All	7/19/06	2:00PM- 4:00PM



5. Return completed Welcome Package Forms and Agreements to EOHHS Virtual Gateway Operations.

Please mail the original executed *Virtual Gateway Services Agreement* (**FORM A**), *EOHHS Virtual Gateway Designation of Access Administrator Form* (**FORM B**), and *EIM/ESM Rider* (**FORM C**) to the following address:

**EOHHS Virtual Gateway Operations
2 Boylston Street, 6th Floor
Boston, Massachusetts 02116**

Please email the *Organization Management Template* (**FORM D**) to:

EMAIL: POS.EIM-ESM@massmail.state.ma.us

The following forms must each be completed and returned to the EOHHS Virtual Gateway Operations in order to issue user accounts in conjunction with your scheduled go-live date:

- *Virtual Gateway Services Agreement* (**FORM A**)
- *EOHHS Virtual Gateway Designation of Access Administrator* (**FORM B**)
- *EIM/ESM Rider* (**FORM C**)
- *Organization Management Template* (**FORM D**)

Once the Virtual Gateway has received these forms and agreements, you will receive the User Request Forms security packet. The User Request Forms are used to add, change, or delete individual user account information for EIM/ESM access through the Virtual Gateway. The EIM/ESM implementation team will follow up with your organization to complete these documents via conference calls or workshops.

For additional information on the EIM/ESM Project go to <http://mass.gov/eohhs> and click on the **Provider** button at the top of your screen, from there click EIM/ESM – Get Started, which is in the blue box on the right side of your screen. You will find Newsletters, the EIM/ESM Fact Sheet, Frequently Asked Questions (FAQs), and the Virtual Gateway System Requirements available for download.

If you have any questions or need additional assistance, please do not hesitate to contact the Virtual Gateway Help Desk at (800) 421-0938.